

0844 264 1440



Preliminary Quick Reference Guide

Usability Test 2011-12

Contents

- 1. Introduction**
- 2. The user interface**
 - 2.1. The main menu
 - 2.2. The working area
 - 2.3. The secondary menu
 - 2.4. The status area
 - 2.5. Buttons and other elements
- 3. Overview of the most important functions**
- 4. Start / exit Navigator**
- 5. Metering settings**
 - 5.1. Overview
 - 5.2. Product setting: Shortcut
 - 5.3. Product setting: Select services and set weight
 - 5.4. Set weight
 - 5.5. Select text message
 - 5.6. Select advert
 - 5.7. Select account
 - 5.8. Set date
 - 5.9. Metering
- 6. Manage texts**
 - 6.1. Enter a new text
 - 6.2. Edit or delete a text
- 7. Manage adverts**
- 8. Manage accounts**
 - 8.1. Overview
 - 8.2. Show accounts and print account report
 - 8.3. Rename accounts
 - 8.4. Clear accounts
 - 8.5. Enable / disable cost accounts
- 9. Manage shortcuts**
 - 9.1. Create new shortcut
 - 9.2. Rename shortcuts
 - 9.3. Resort shortcuts
 - 9.4. Delete shortcuts
- 10. Reset piece counter**
- 11. Load postage**
- 12. Redate**
- 13. Troubleshooting**

1. Introduction

About this Quick Reference Guide

This Quick Reference Guide assumes that both PostBase and Navigator have already been installed and are now operational.

Target group This Quick Reference Guide is aimed at participants of a usability test. Users of Navigator should have basic knowledge of Windows. They do not need special computer skills.

Topics The present manual provides a comprehensive overview of the software and describes how to perform daily routine tasks.

[Connect] Names of links and buttons are given in square brackets.

TIP Tips for improving the operation or additional information appear in italics.

What is PostBase Navigator?

PostBase Navigator is a user-friendly PC application enabling you to set up, maintain and use your PostBase metering system.

You are able to perform your metering system's basic functions directly on your computer. PostBase Navigator also enhances functionality and provides additional possibilities not available at the metering system.

**Application areas
(examples)**

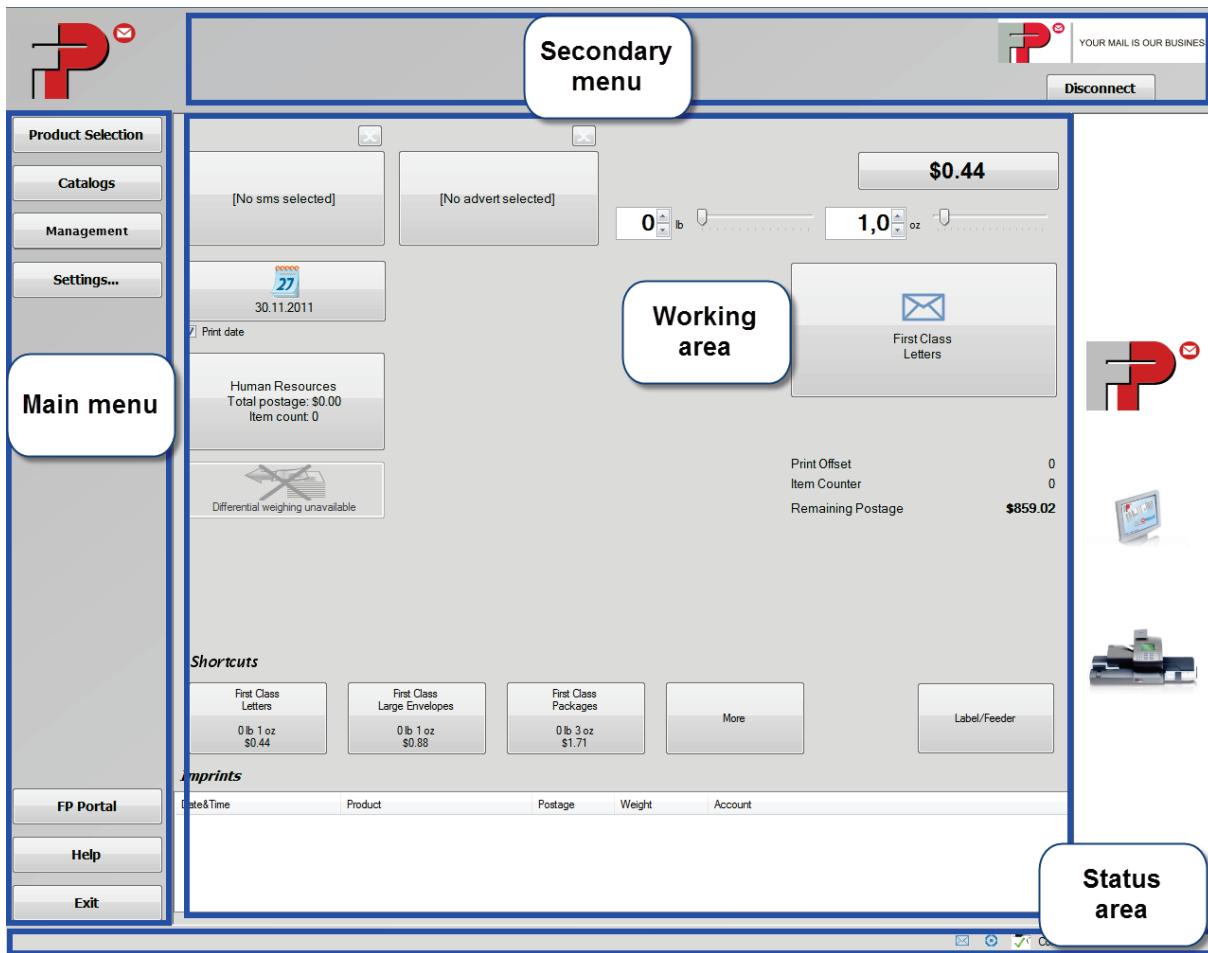
- Manage advertising imprints
- Manage cost accounts
- Create shortcuts
- Change system settings of PostBase
- Load postage
- Adjust the metering imprint
- Start metering

**System
environment**

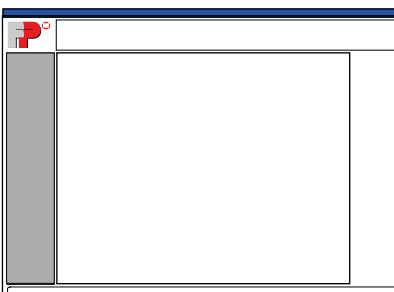
- Windows XP
- Windows Vista
- Windows 7

2. The user interface

You will first receive a short overview of your software's user interface. In the following chapters, the individual areas will be explained in detail.

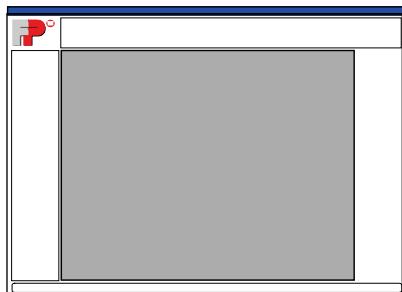


2.1. The main menu

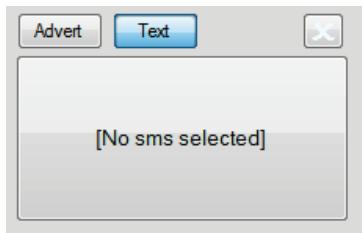


From the main menu, you get to the menus [Product selection], [Management] and [Mailhandler] by clicking on the corresponding button. The selected menu will appear in the working area. In the main menu, you can also call the [Settings...], [FP Portal] and [Help] functions. The [Exit] button closes the program.

2.2. The working area



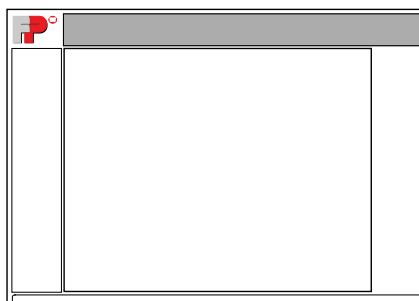
The active menu appears in the Navigator working area. In order to make it easier for you to switch between software and PostBase, the working area was designed on the basis of your metering system's display.



Click on [Advert] to transform a field for text into an advert field or vice versa. It is possible to print two adverts or two text messages.

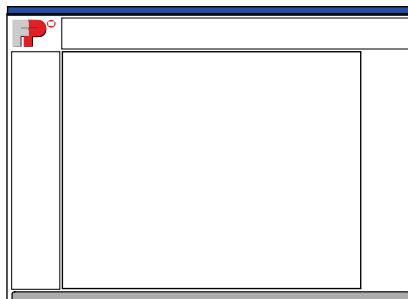
Advert

2.3. The secondary menu



The secondary menu provides additional functions for the active menu in the working area. Click, for example, on [Connect] or [Disconnect] to establish or terminate the connection with PostBase.

2.4. The status area



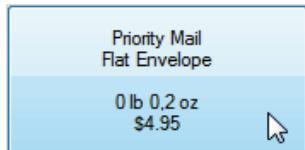
The status area provides, inter alia, information on the connected metering system and on current processes.

2.5. Buttons and other elements

You can operate Navigator using the following elements:

< Back

Buttons



Selection field



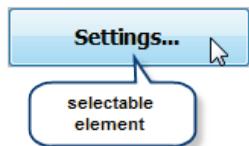
Arrow buttons



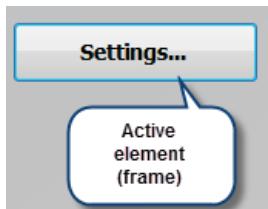
Slider



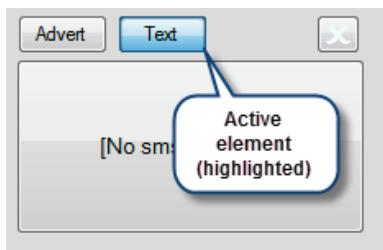
Input Box



Selectable elements turn blue as you scroll your mouse over them.



If a button is active, it is highlighted in blue or it is framed with a blue border.



Active
element
(highlighted)

3. Overview of the most important functions

In this section, you get to know the most important functions of your software.



Manage text messages

Navigator enables you to enter texts via PC keyboard and to store up to eight different text messages. You can access all stored texts from PostBase.



Manage accounts

Navigator shows you all existing accounts. It provides information about their number and name, their postage consumption and number of meter imprints performed since the last reset. You can manage the accounts on your PC or set them to zero.



Shortcuts

Navigator offers shortcuts which can store frequently used meter imprints. You can set three or four shortcuts for PostBase. Navigator itself even features 25.

You can delete, overwrite and rename shortcuts.



Metering settings

- Services
- Weight
- Advert / Text
- Account
- Change date

You can easily define metering settings from your PC.

These include product settings (services and weight) as well as selecting a text message and / or an advert.

Furthermore, you can select an account and adjust the date of postage. (Predating is possible)



Metering

Navigator enables you to start the metering process directly from your PC.



Load postage

You can load postage quickly and conveniently setting up an internet connection with the data center.



Warning function

- Low postage
- High postage

Determine at which postage credit threshold your PostBase will alert you to load postage.

You can also set a limit for the 'High postage Warning' function. It will issue a message if you enter a postage value above the set threshold.

**Piece counter**

Check the number of metered mail pieces.

**Imprint offset**

Adjust the imprint offset to change the meter imprint position on the envelope.

(Symbol fehlt
noch)

Account reports

- show
- print

Account reports cover all accounts. They contain information about postage consumption and the number of meter imprints performed since the last reset.

**Navigator settings**

Define software settings, e.g. for printing reports.

**Connection to the
FP portal**

Navigator sets up a connection to Francotyp-Postalia's web portal. Through your account, you can order accessories for your PostBase and manage adverts.

**Help function**

If you run into problems while working with Navigator, click [Help] to review a well structured user's manual.

If our help function shouldn't be sufficient to solve your problems, please consult the FP web page.

**hide**

Hide a menu.

**save**

Save an entry (e.g. a new text message).

**cancel**

Reject an entry.

**clear /
delete**

- Remove from selection
- Delete
- Clear data

Delete selection (text / advert).

Delete shortcut or text message.

Reset piece counter or cost account to zero.

4. Start / exit Navigator



Double click the FP icon on your desktop to start Navigator.

Connect

When opening, Navigator automatically establishes a connection to PostBase.

If that is not the case, check if PostBase shows the home menu and click [Connect] on the secondary menu.

Exit

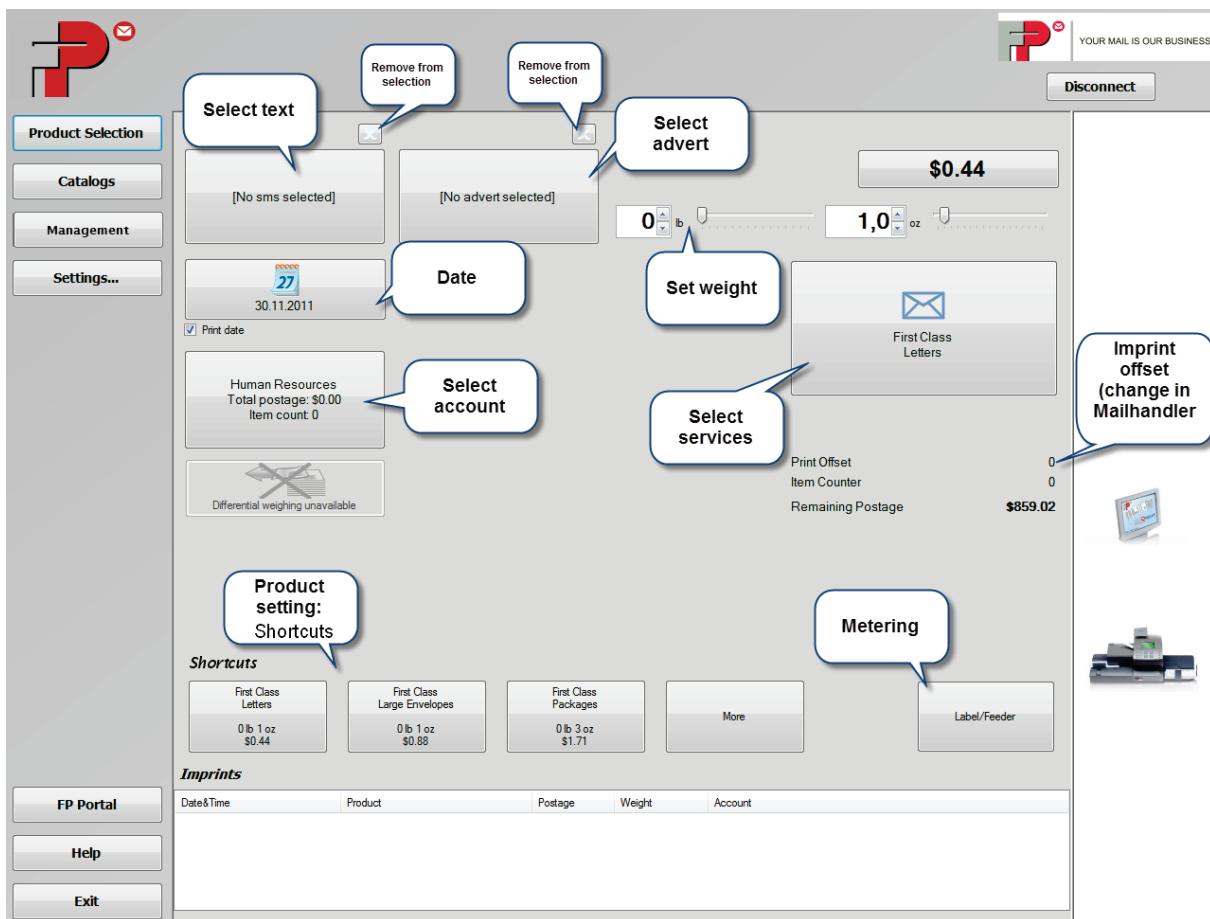
If you want to exit the Navigator program, click [Exit] on the main menu or the [x]-Button on the top right corner.

5. Metering settings

5.1. Overview

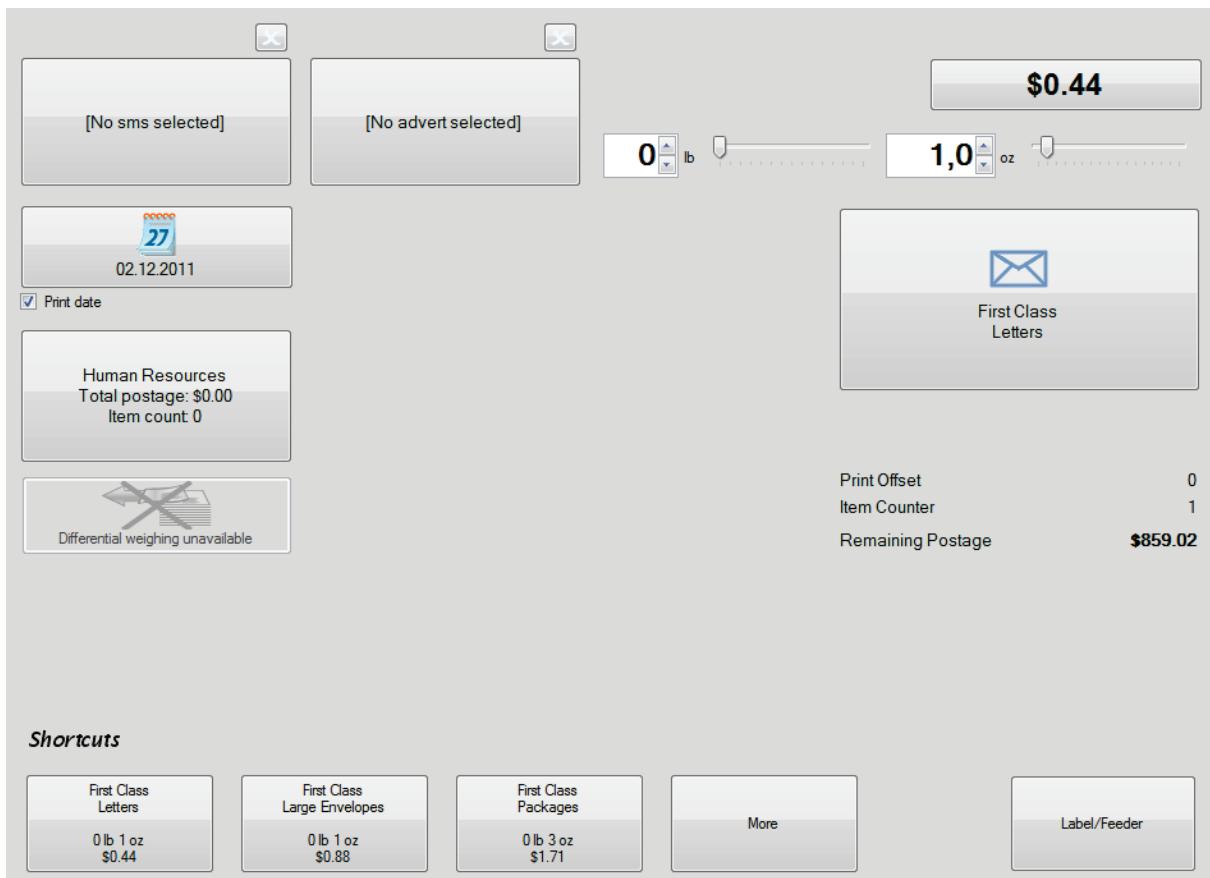
In the 'Product Selection' menu, you find your mail's characteristics.

When setting up a connection to the metering system, Navigator synchronizes settings with PostBase. The next section describes how to change the different settings.

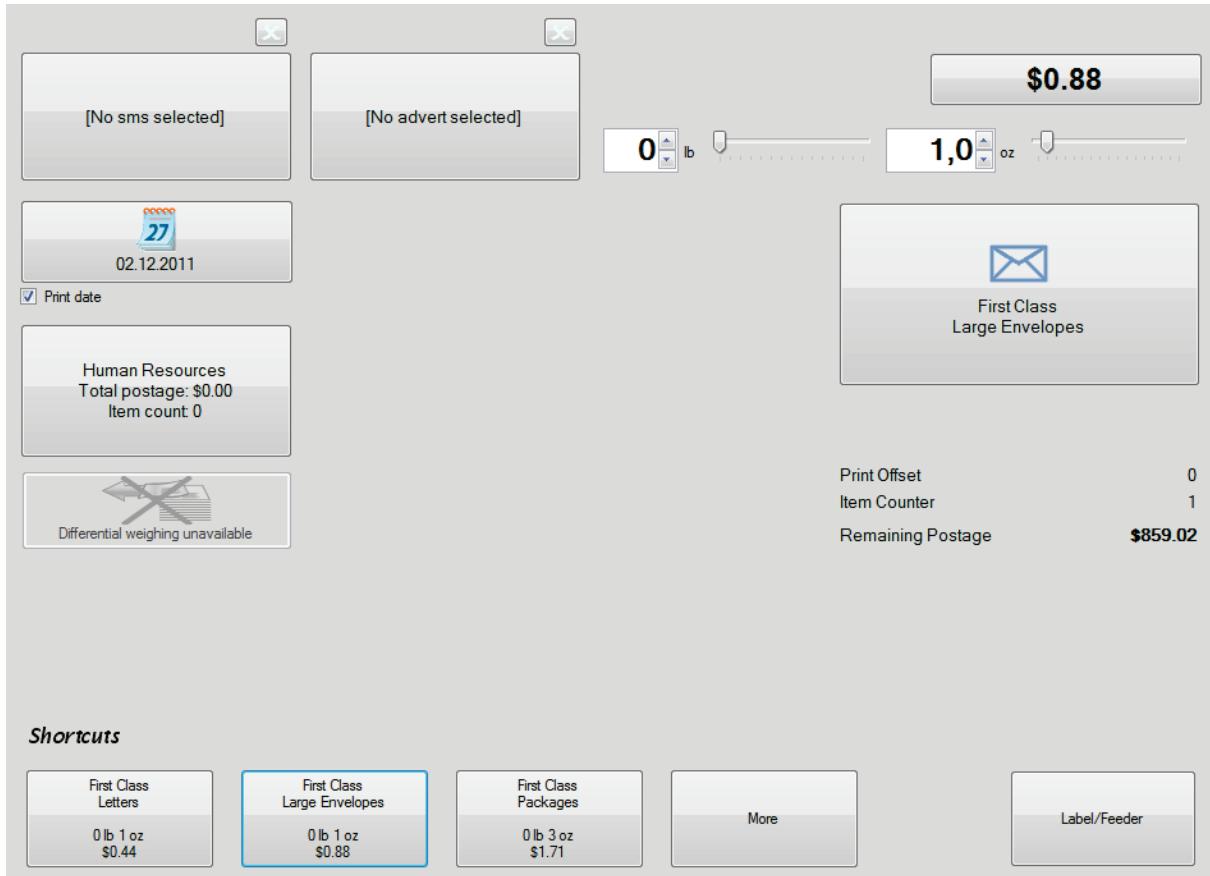


5.2. Product setting: Shortcut

Navigator directly offers the first three shortcuts in its ‘Product Selection’ menu. Click on [More] to open the menu ‘Product shortcuts’. This menu displays all available shortcuts.



Select the desired shortcut. Navigator applies the product settings.



TIP: If you want to edit shortcuts or create a new one, please refer to [chapter 9](#).

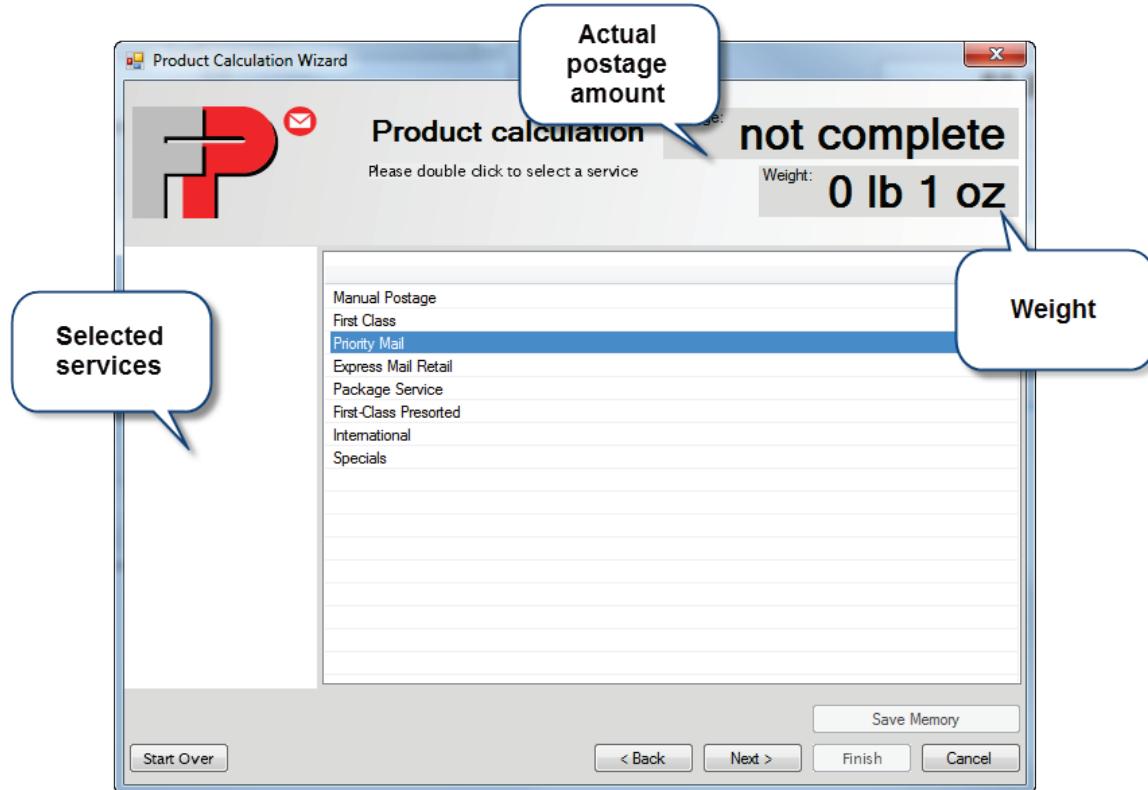
5.3. Product setting: Select services and set weight

Select services



Click on the field for selecting services to set a product.

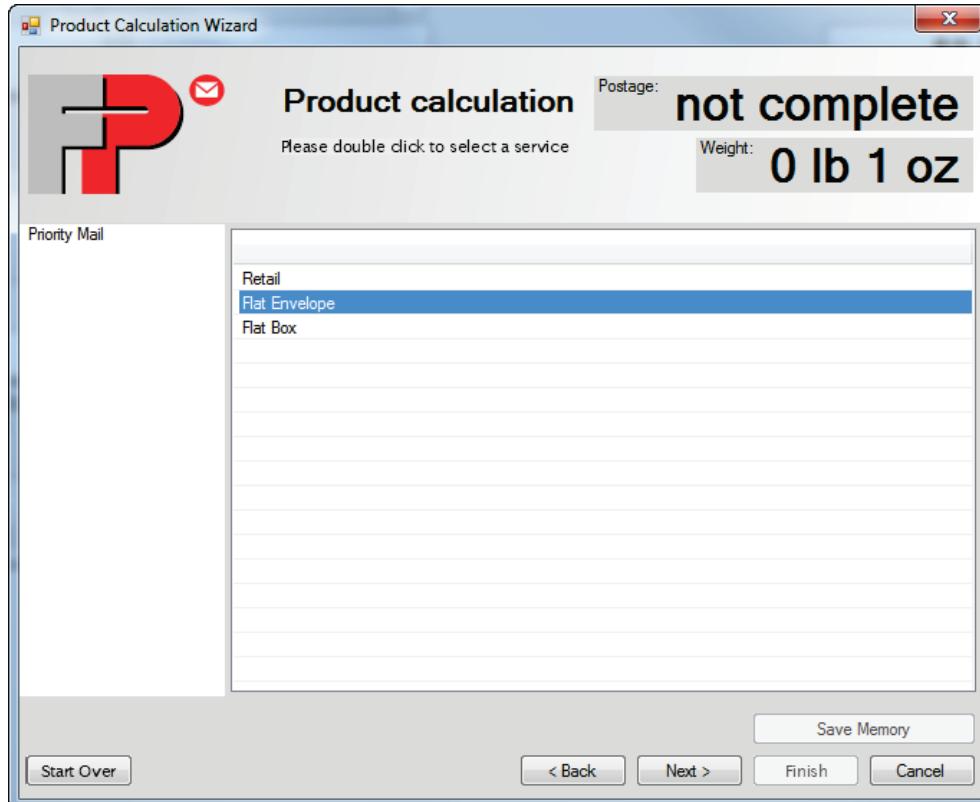
Navigator opens the Product Calculation Wizard. On the left-hand side of the window, you see all selected characteristics. Postage amount and set weight are displayed on the top right corner.



Next >

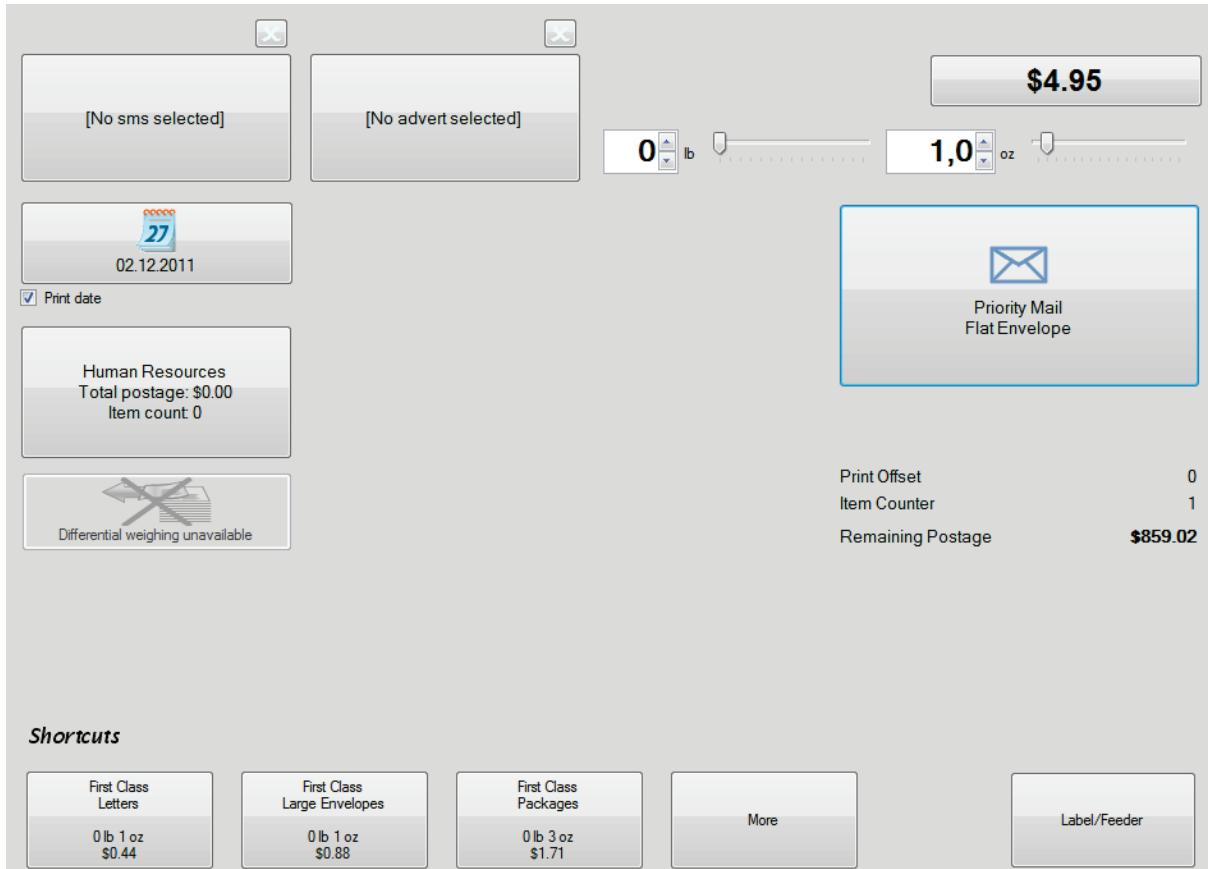
Select a service and click on the [Next]-Button. Navigator adopts your selection, offering further services. Select all desired services in this way.

TIP: Instead of selecting the [Next] button, you can also double click on the desired service.



Finish

Click [Finish] to confirm. Navigator closes the Product Calculation Wizard. Your desired product has been set for metering.



Set weight

Place the mail piece on the PostBase weighing platform to determine the piece's weight.

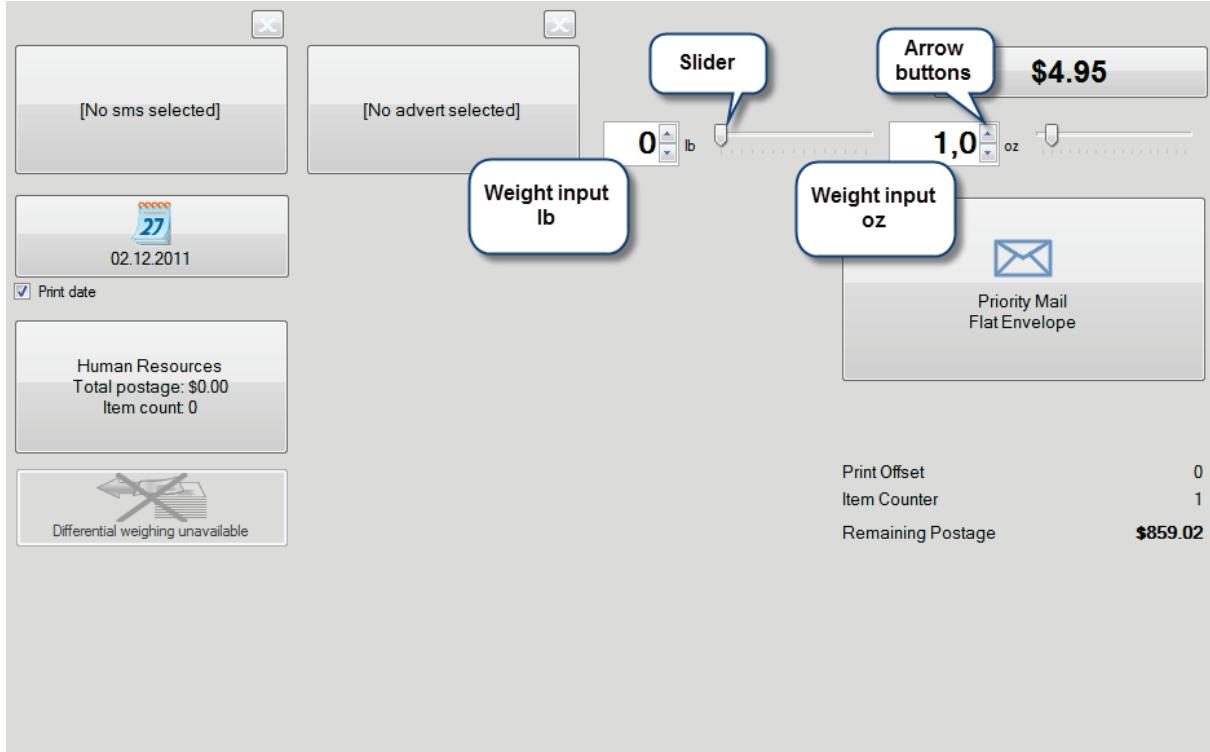
TIP: In the 'Product Selection' menu, you can manually enter a weight value. (See [chapter 5.4.](#))

5.4. Set weight

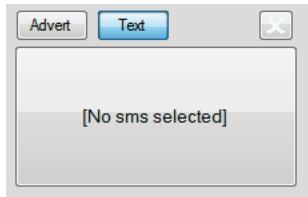
If you place the mail piece on the PostBase weighing platform, Navigator automatically transfers the weight value. In this case, you do not need to enter it manually. If you use the shortcut function, there is a preset weight value.

However, it is sometimes necessary to use Navigator to enter a weight value, e.g. if there are connection errors with PostBase or if your mail piece should exceed the allowable weighing range.

There are two input boxes (pounds and ounces) for the weight of the mail piece. Click on the input box to enter a weight via PC keyboard. You can also set the weight by arrow buttons or by slider.

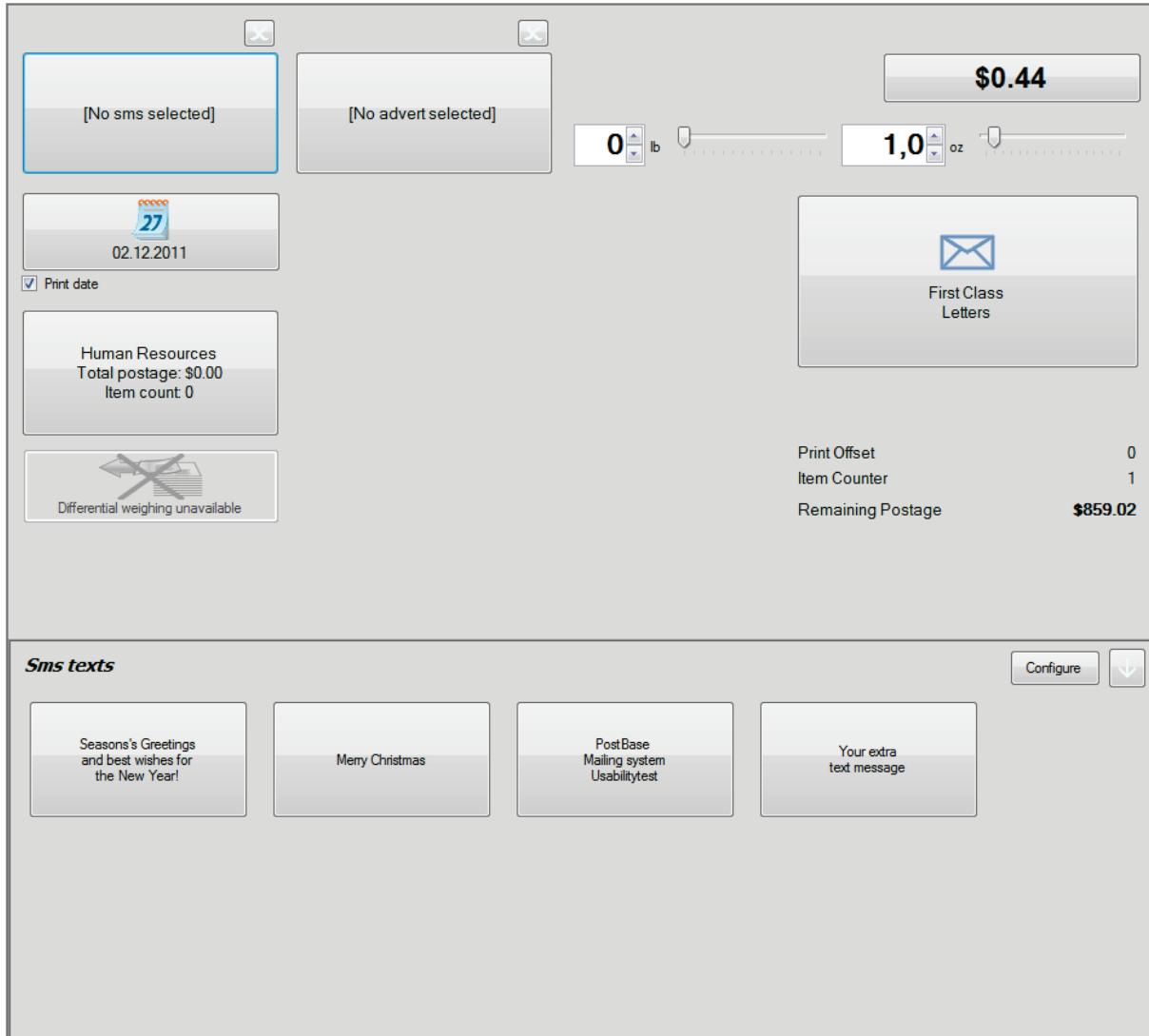


5.5. Select text message

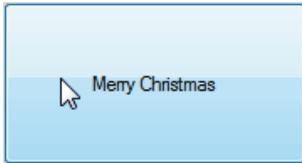


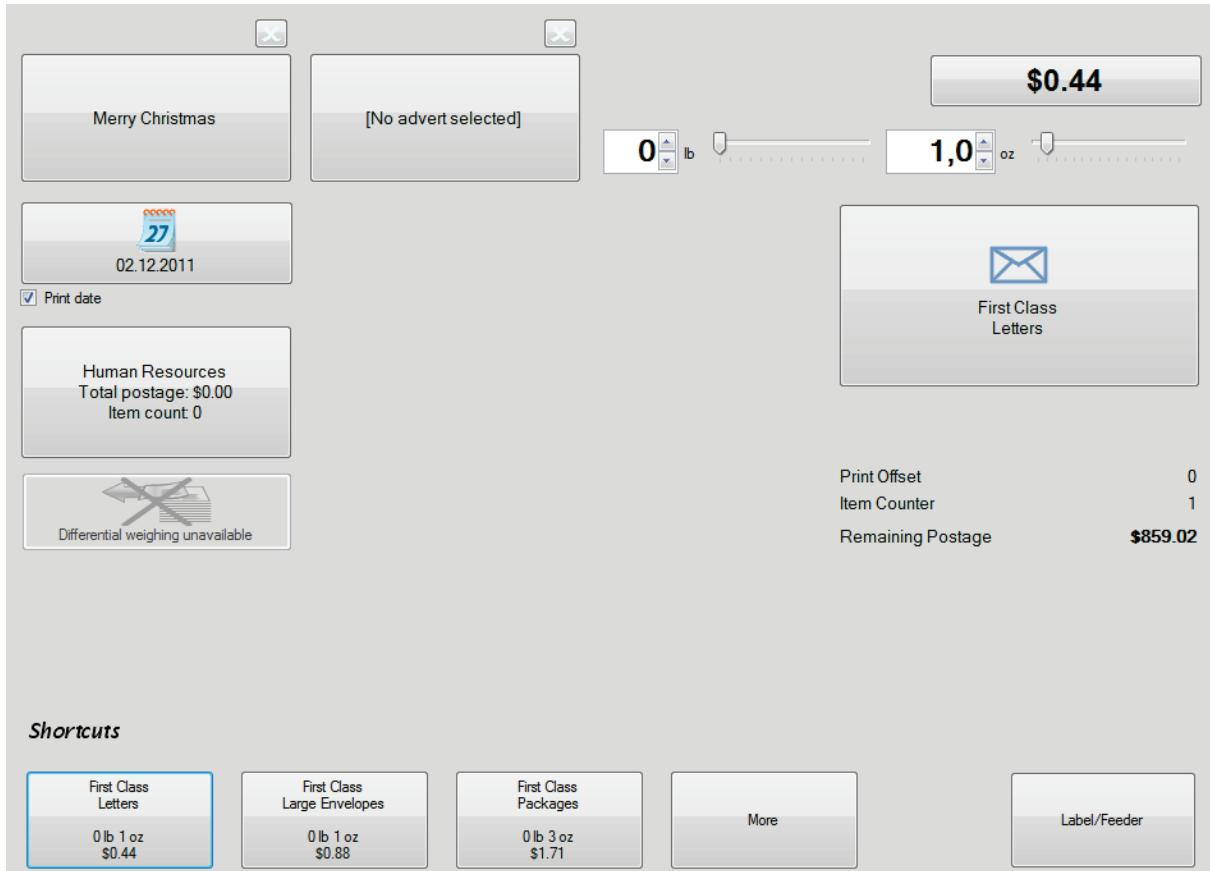
Click on the field for selecting text messages.

The ‚Sms texts‘ menu opens in the lower part of the working area. It displays all available text messages.



Select the desired text. Navigator adopts a text message closing the ‚Sms texts‘ menu.



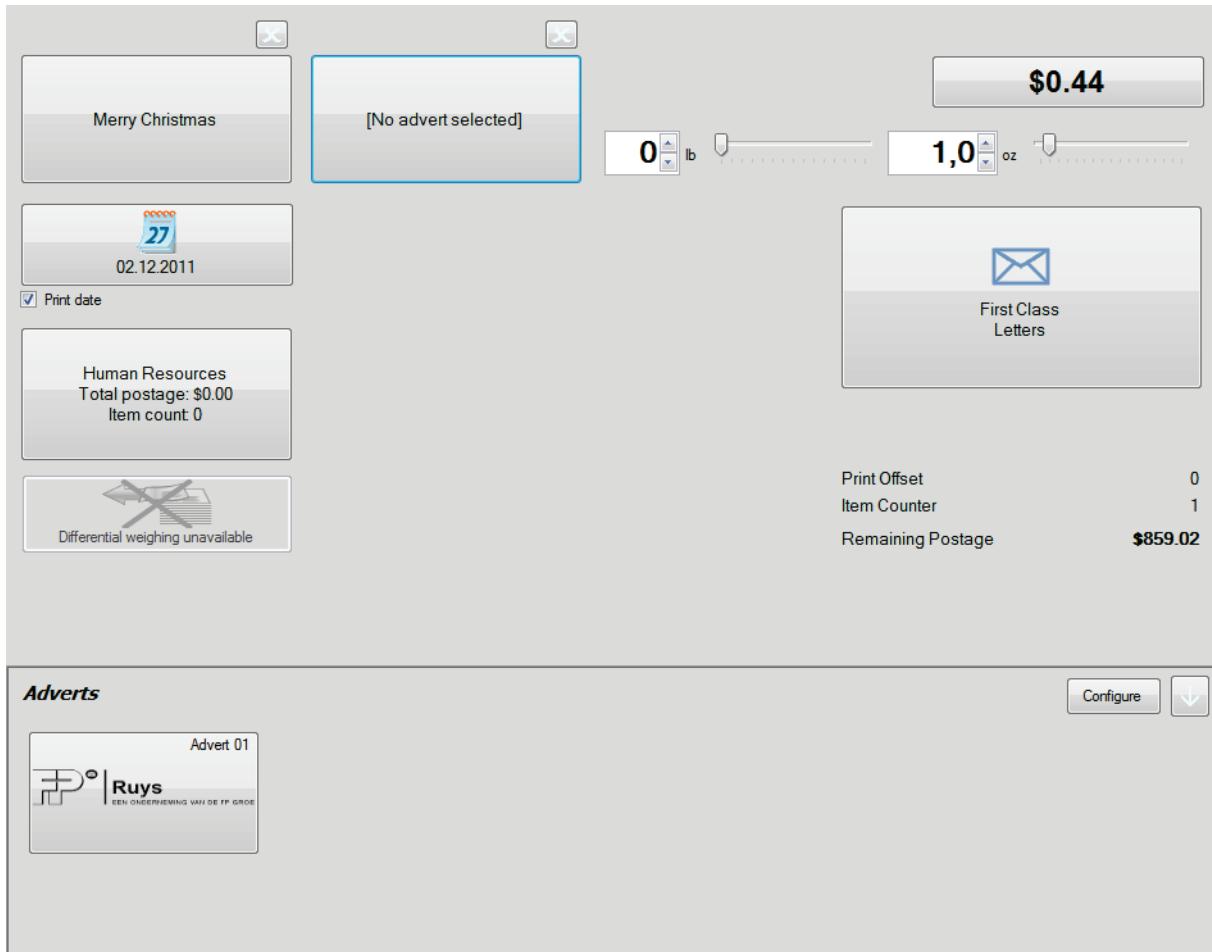


5.6. Select advert

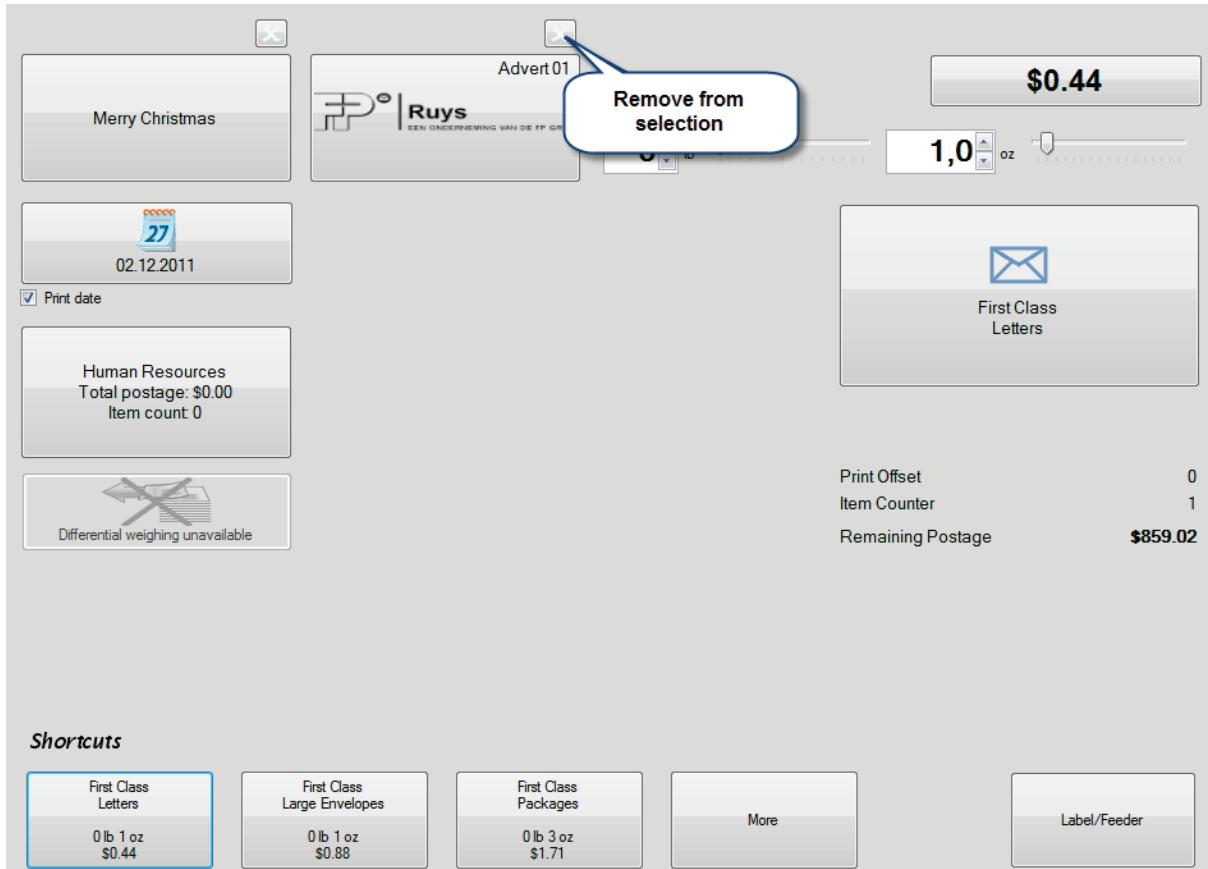


Click on the field for selecting adverts.

The 'Adverts' menu opens in the lower part of the working area. It displays all available advertisings.



Select the desired advertising. Navigator adopts an advert closing the 'Adverts' menu.



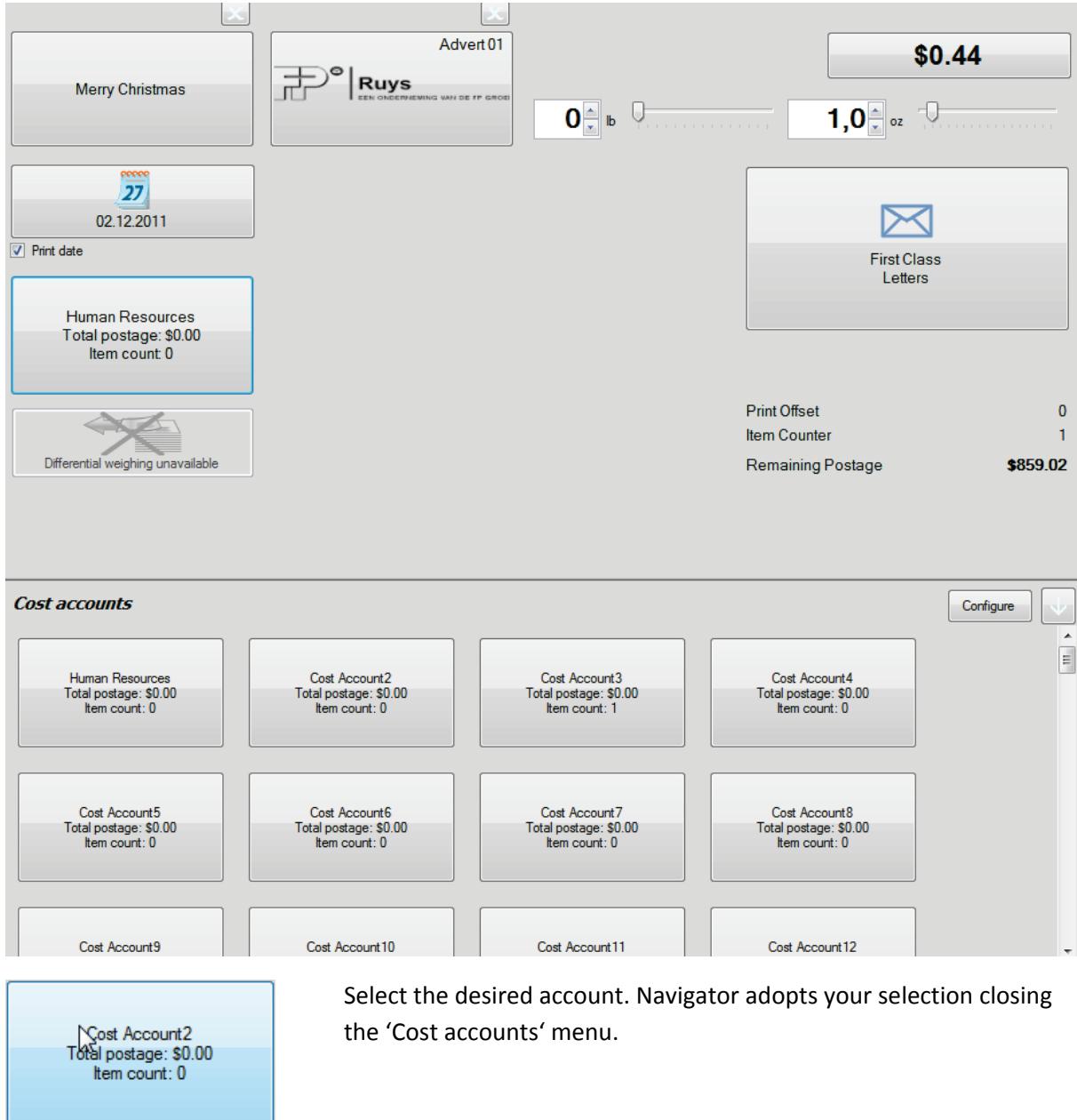
TIP: If you click [Manage], you have the possibility to download adverts from the FP portal.

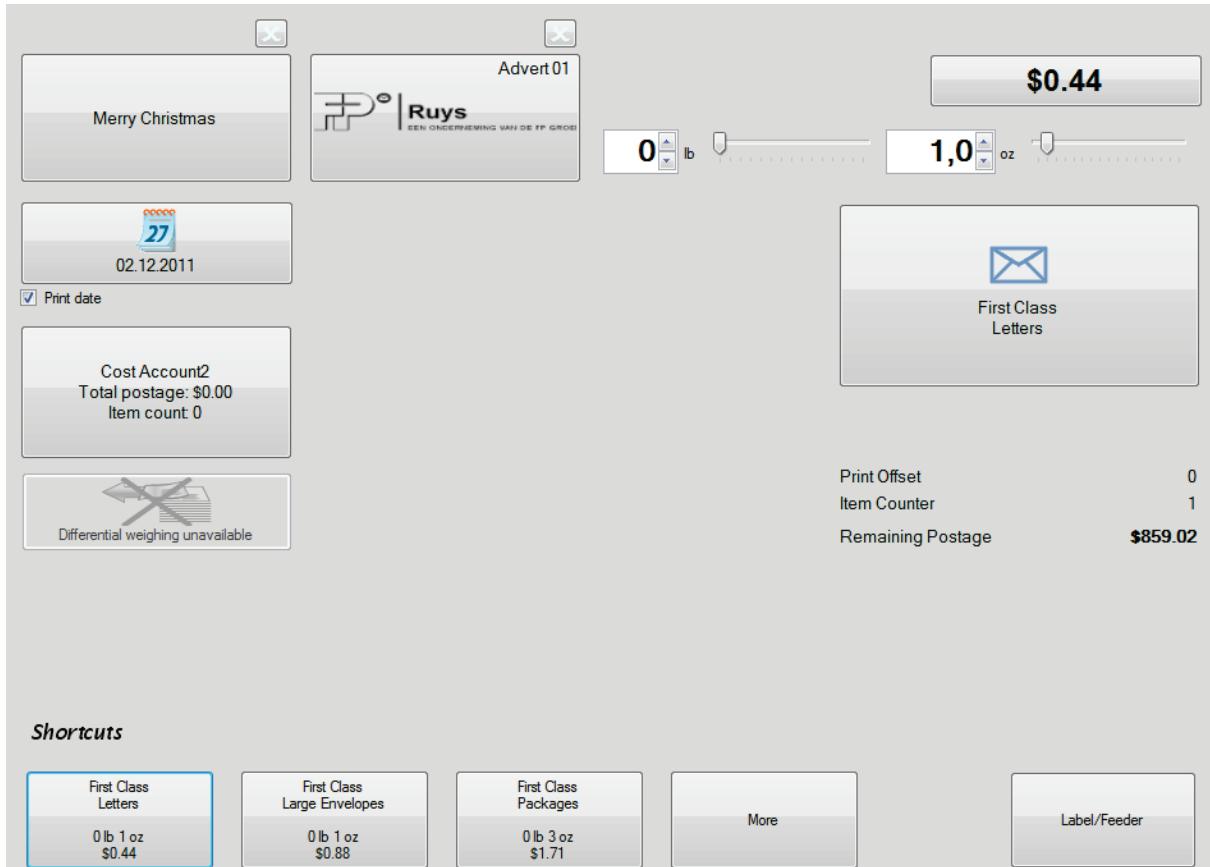
5.7. Select account



In the 'Product Selection' menu, the field for selecting accounts shows you the name of the active account. It also displays postage consumption and number of performed meter imprints. Select this field to change the account.

The 'Cost accounts' menu opens in the lower part of the working area. It displays all available accounts.



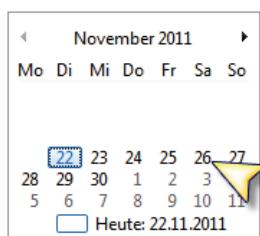


TIP: If you need information on how to manage cost accounts, please refer to [chapter 8](#).

5.8. Set date



Click on the button displaying a date in the 'Product Selection' menu.



Navigator opens a calendar window. It displays the allowable predating range. At the bottom of the window, you see the actual date.

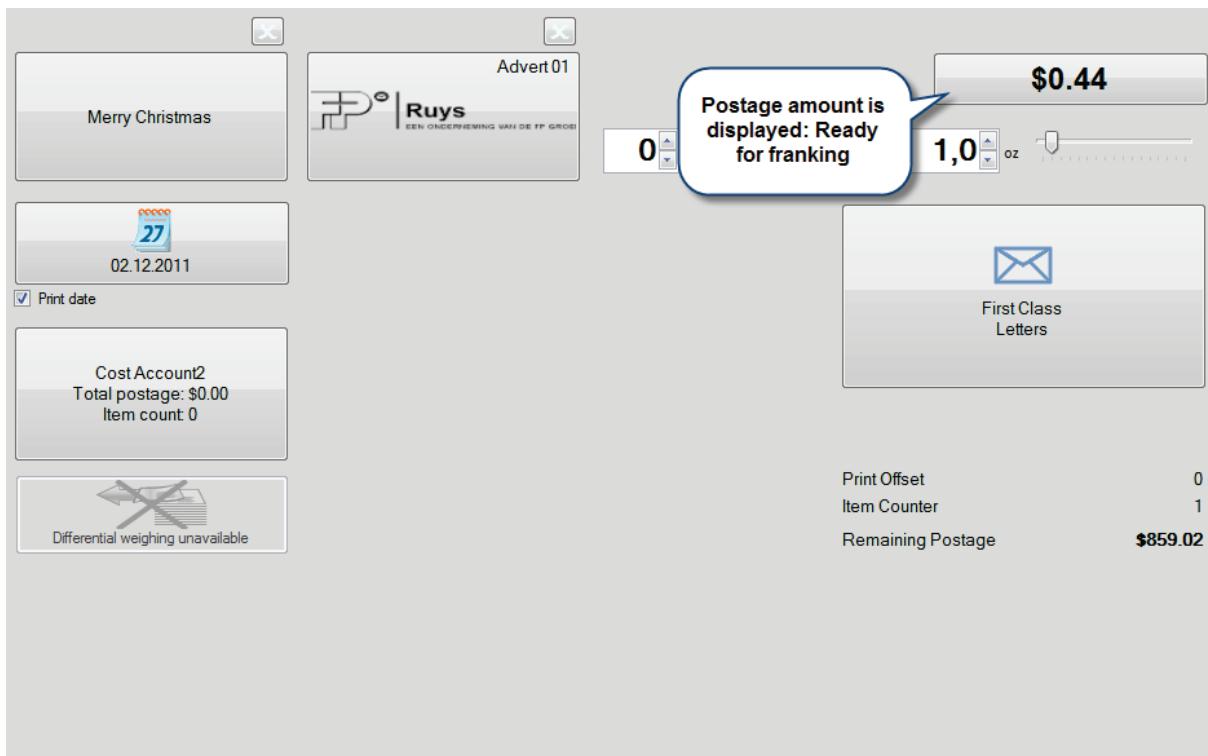
Click on the desired date.



The new date of postage appears in the 'Product Selection' menu.

5.9. Metering

A postage amount in the right top corner of the ‘Product Selection’ menu indicates: PostBase is ready for metering. Before you start metering, check if all characteristics displayed in Navigator are correct.



There are the following possibilities for starting the metering process:

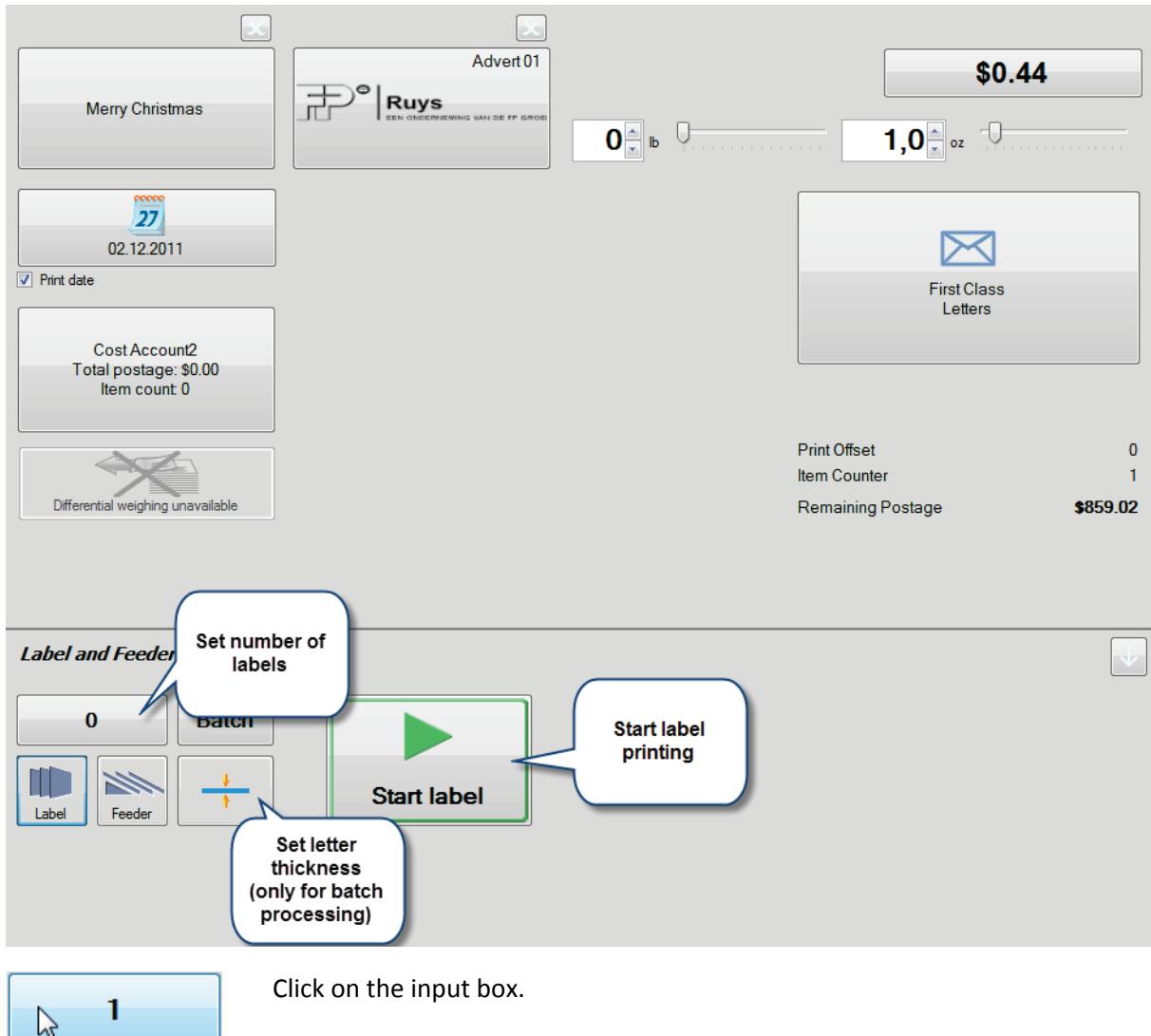
- Place a letter on the hand feed tray.
- Start label printing as usual.
- Start batch processing by feeder as usual.
- Start metering process from Navigator.

If you place a letter on the PostBase feeder, metering process starts automatically as soon as the sensor recognizes it.



Click on the [Label/Feeder] button to start metering from Navigator. (*The following example shows a menu for PostBase with label dispenser and without feeder.*)

The metering menu opens in the lower part of the working area.



Type in the desired target count via PC keyboard.

You can also enter figures using the arrow buttons.

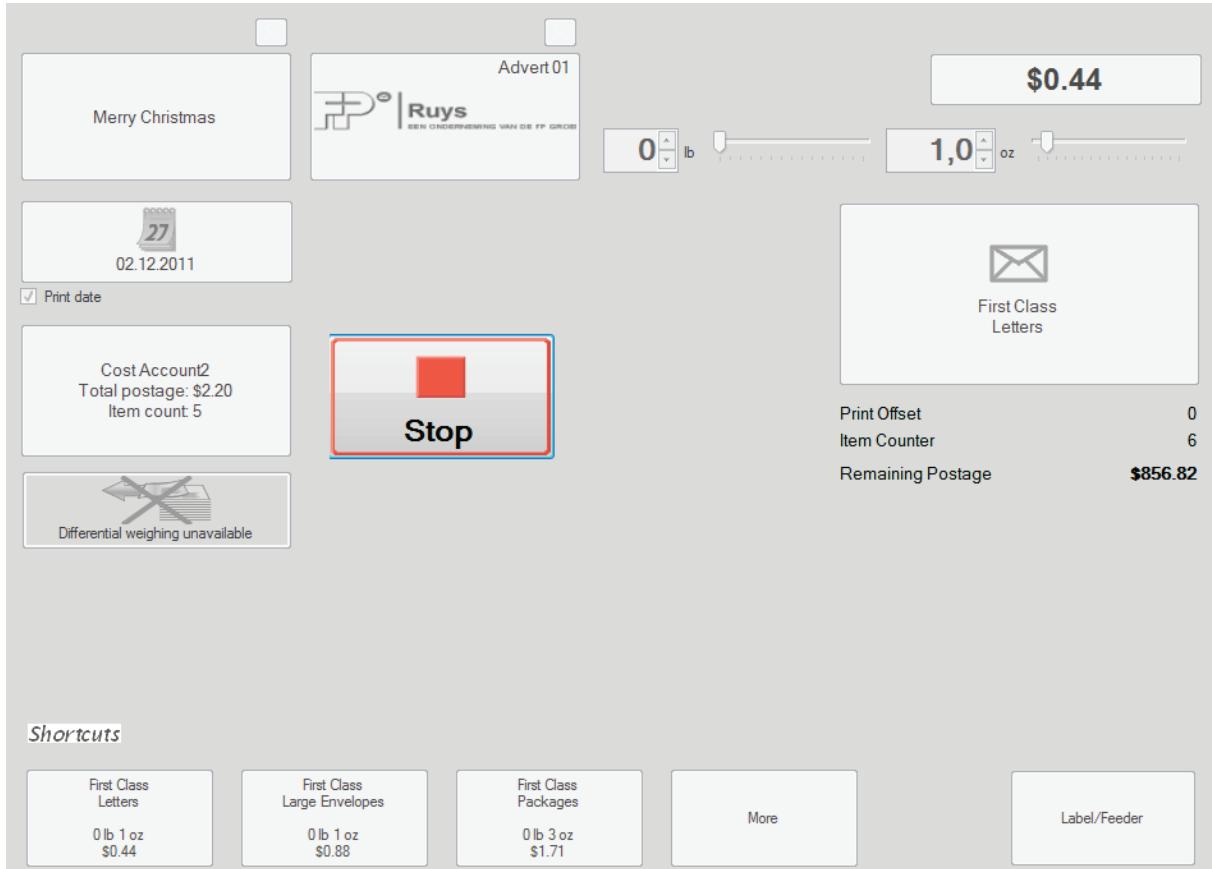


Click the **X** button to reject your entry. Save your entry selecting the **✓** button.

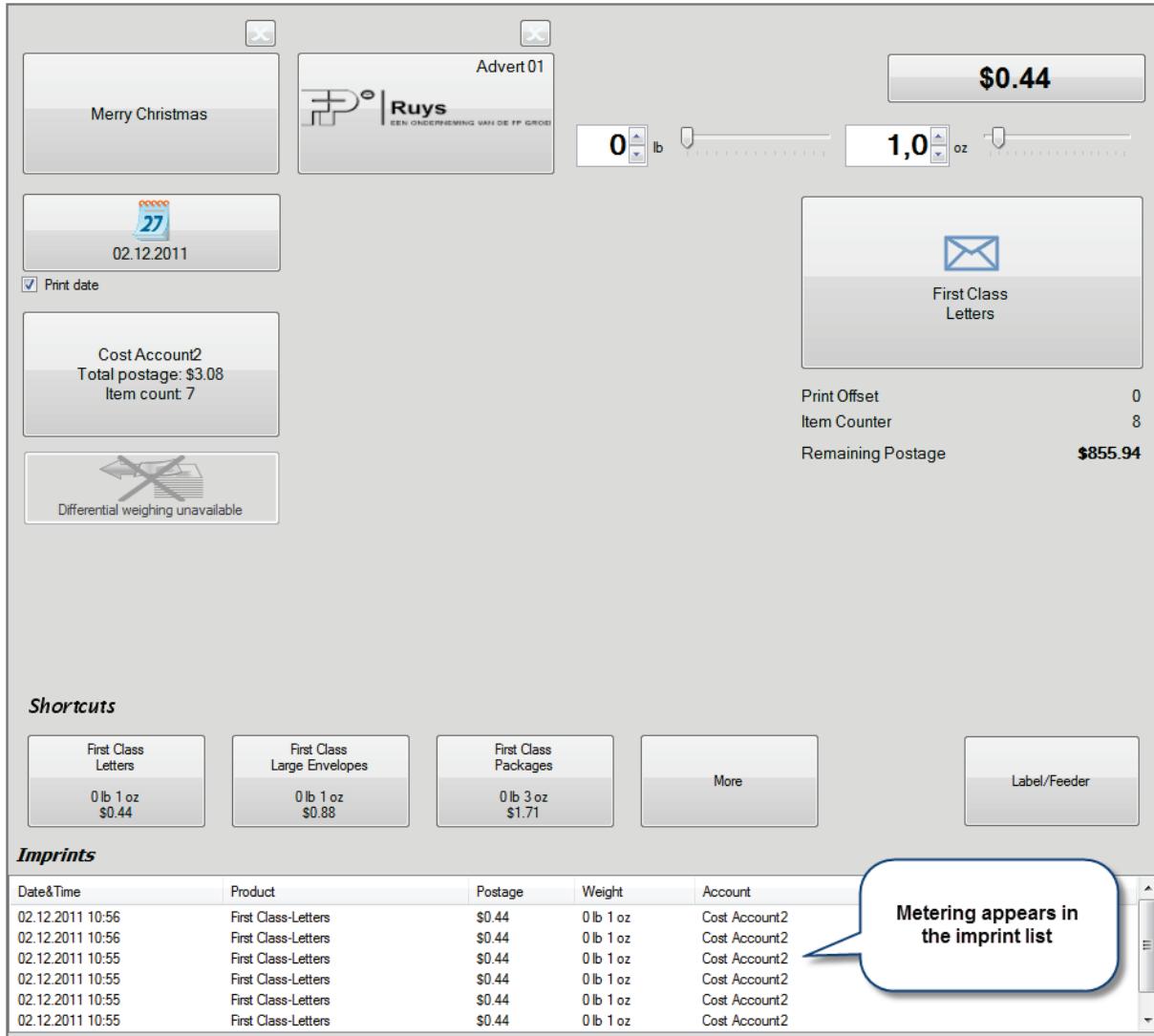


When you have set the desired number of labels, click on [Start label] to start label printing.

During operation, the following window shows.



When the metering process is complete, the 'Product Selection' menu appears in the working area again. The metering appears in the imprint list.



The screenshot shows the PostBase Navigator software interface. The top right corner displays a total postage of **\$0.44**. Below it, weight settings show **0 lb** and **1.0 oz**. The working area contains several items:

- A card labeled "Merry Christmas" with a small "x" icon in the top right corner.
- An "Advert 01" card featuring the logo of "Ruys" (EEN ONDERNEMING VAN DE TP GROEP).
- A date stamp showing **02.12.2011**.
- A checkbox labeled "Print date" which is checked.
- A box showing "Cost Account2" with "Total postage: \$3.08" and "Item count: 7".
- A note indicating "Differential weighing unavailable" with a crossed-out scale icon.
- A box for "First Class Letters" with a mail icon.
- Metrics on the right: Print Offset 0, Item Counter 8, and Remaining Postage **\$855.94**.

Shortcuts

First Class Letters 0 lb 1 oz \$0.44	First Class Large Envelopes 0 lb 1 oz \$0.88	First Class Packages 0 lb 3 oz \$1.71	More	Label/Feeder
--	--	---	------	--------------

Imprints

Date&Time	Product	Postage	Weight	Account
02.12.2011 10:56	First Class-Letters	\$0.44	0 lb 1 oz	Cost Account2
02.12.2011 10:56	First Class-Letters	\$0.44	0 lb 1 oz	Cost Account2
02.12.2011 10:55	First Class-Letters	\$0.44	0 lb 1 oz	Cost Account2
02.12.2011 10:55	First Class-Letters	\$0.44	0 lb 1 oz	Cost Account2
02.12.2011 10:55	First Class-Letters	\$0.44	0 lb 1 oz	Cost Account2
02.12.2011 10:55	First Class-Letters	\$0.44	0 lb 1 oz	Cost Account2

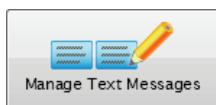
A blue callout bubble points to the imprint list table with the text: **Metering appears in the imprint list**.

6. Manage texts

6.1. Enter a new text

Management

Click on [Management] in the main menu.



Select [Manage text messages].

Manage text messages

4 of 12 text messages defined

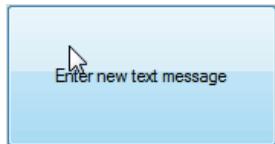
Season's Greetings and best wishes for the New Year!	X	Merry Christmas	X	PostBase Mailing system Usabilitytest	X
Your extra text message	X	Enter new text message			

Management

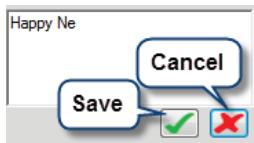
Manage Text Messages

Manage Shortcuts

Manage Accounts



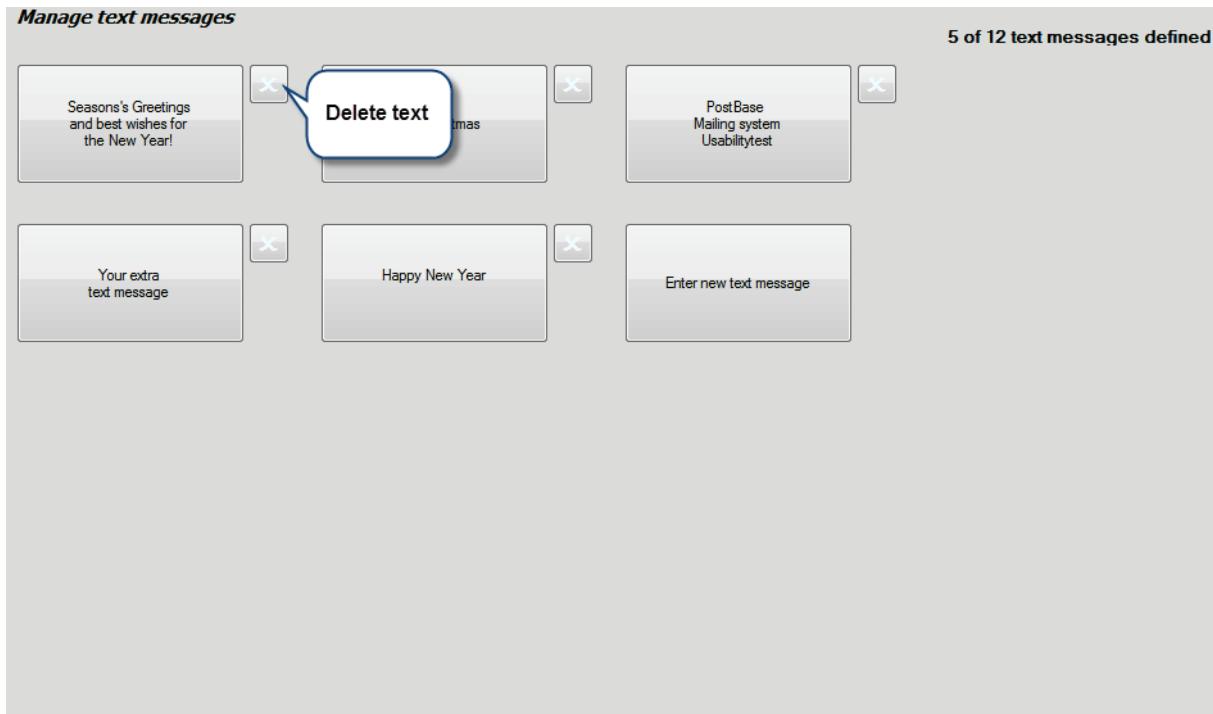
Click on [Enter new text message].



You can now enter a text of your choice , of up to XXX letters.

Select the button to save your entry. In Navigator, you can store up to 12 different text messages.

You can now select the new text in the 'Manage Text Messages' menu.

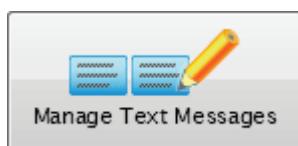


6.2. Edit or delete a text

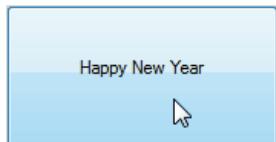
Edit a text



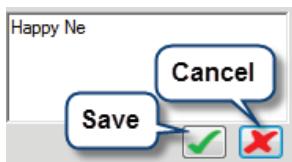
Click on [Management] in the main menu.



Select [Manage Text Messages].



Click on the text you want to edit.



Navigator opens an input box for text. Enter a new text. Click to save.



Delete a text



Click button  in the upper part right of the text.

7. Manage adverts

For the administration of the advertisings, please refer to the FP portal. Here you find all Logos available for download.



Click on the field for selecting adverts in the 'Product selection' menu.

The 'Adverts' menu opens in the lower part of the working area. It displays all available advertisings.

Print Offset	0
Item Counter	1
Remaining Postage	\$859.02

Adverts

Advert 01

Ruys
EEN ONDERNEMING VAN DE FP GROEP

Configure

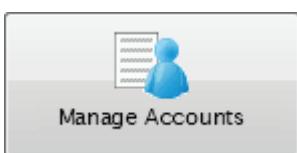
Click on [Manage]. Navigator sets up a connection to the FP portal.

8. Manage accounts

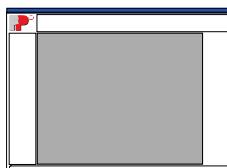
8.1. Overview

Management

Click on [Management] in the main menu.



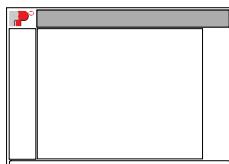
Select [Manage accounts].



All accounts are displayed in the working area.

Manage accounts

Human Resources Total postage: \$0.00 Item count: 0	X	Cost Account2 Total postage: \$3.08 Item count: 7	X	Cost Account3 Total postage: \$0.00 Item count: 1	X
Cost Account4 Total postage: \$0.00 Item count: 0	X	Cost Account5 Total postage: \$0.00 Item count: 0	X	Cost Account6 Total postage: \$0.00 Item count: 0	X
Cost Account7 Total postage: \$0.00 Item count: 0	X	Cost Account8 Total postage: \$0.00 Item count: 0	X	Cost Account9 Total postage: \$0.00 Item count: 0	X
Cost Account10 Total postage: \$0.00 Item count: 0	X	Cost Account11 Total postage: \$0.00 Item count: 0	X	Cost Account12 Total postage: \$0.00 Item count: 0	X
Cost Account13 Total postage: \$0.00 Item count: 0	X	Cost Account14 Total postage: \$0.00 Item count: 0	X	Cost Account15 Total postage: \$0.00 Item count: 0	X



In the secondary menu, different functions are available:

Print

Print account reports.

Preview

Call up a preview of account reports.

Disable

Disable cost accounts.

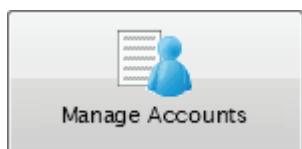
Clear all accounts

Clear all cost accounts.

8.2. Show accounts and print account report

Management

Click on [Management] in the main menu.



Select [Manage accounts].

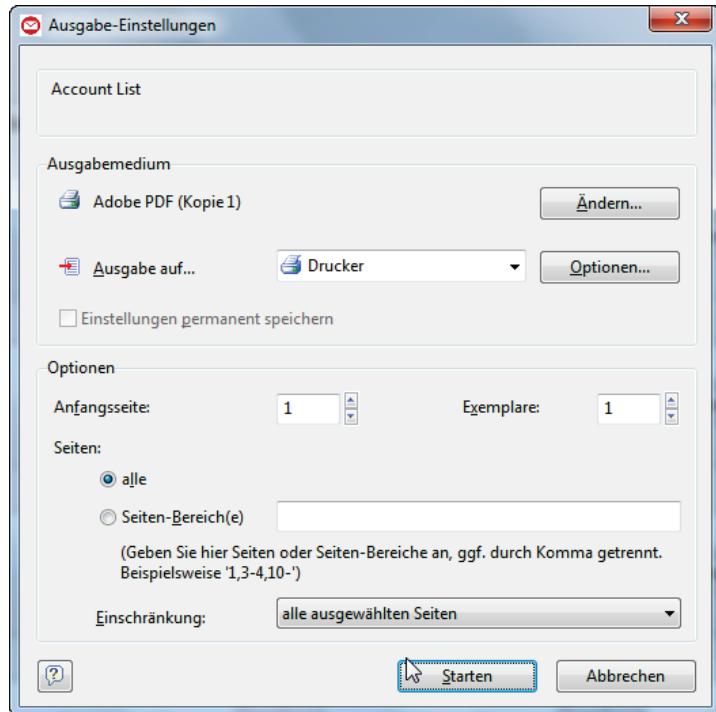
Preview

Click [Preview] to call up a preview of the account report.

Print

Select [Print] in the secondary menu to print the account report.

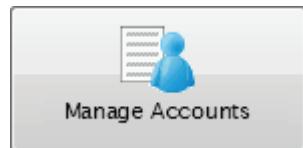
Navigator opens a window enabling you to make printing settings and start printing.



8.3. Rename accounts

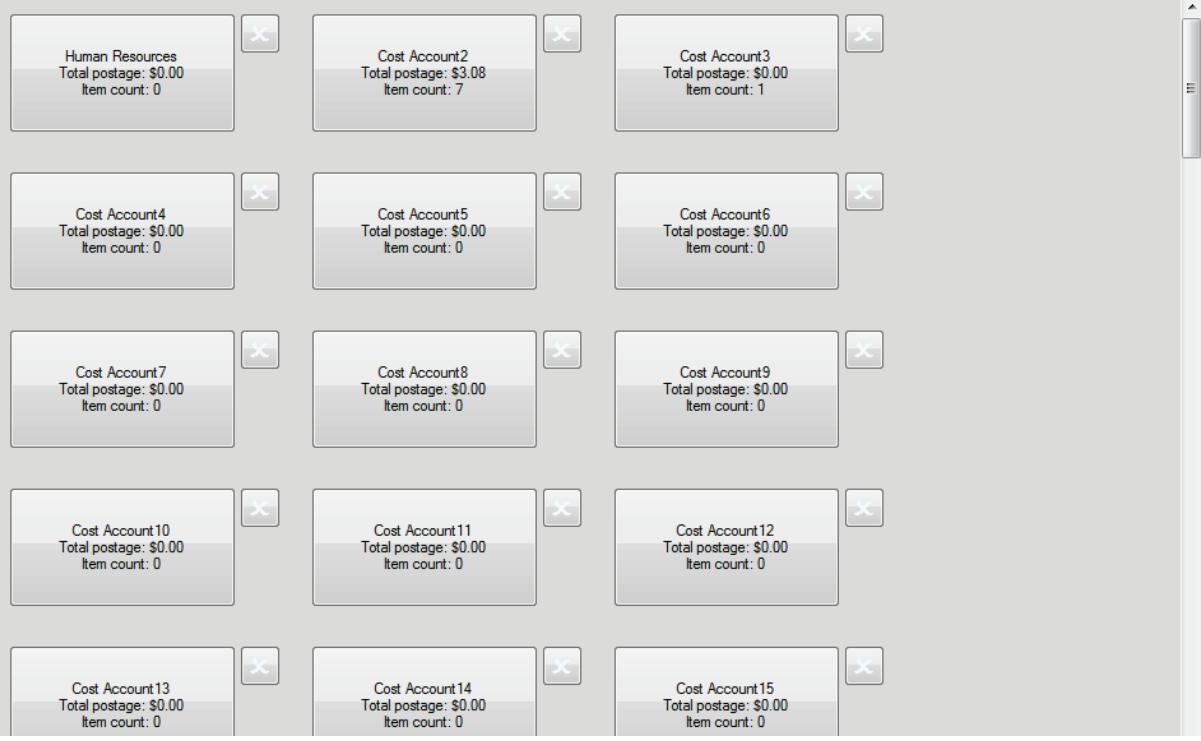
Management

Click on [Management] in the main menu.



Select [Manage accounts].

Manage accounts



Click on the account you want to rename.



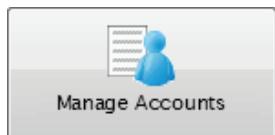
Navigator opens an input box for text. Enter a new name. Click  to save.

8.4. Clear accounts

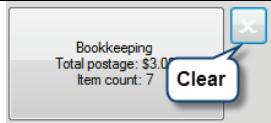
Clear a single account



Click on [Management] in the main menu.



Select [Manage accounts].



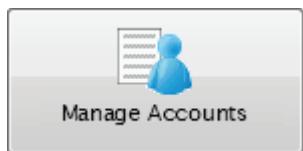
Click on the  button to reset the account's piece counter and postage consumption to zero.



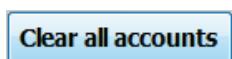
Clear all accounts



Click on [Management] in the main menu.



Select [Manage accounts].

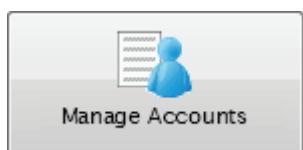


Click [Clear all accounts] in the secondary menu to reset all cost accounts to zero.

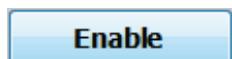
8.5. Enable / disable cost accounts



Click on [Management] in the main menu.



Select [Manage accounts].

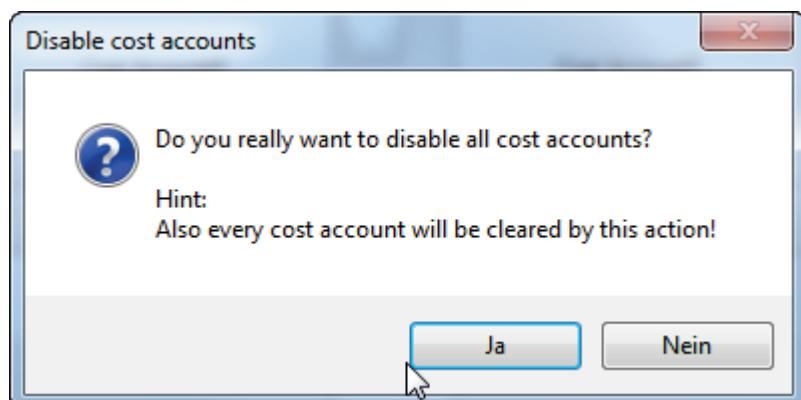


Enable cost accounts: Click the [Enable] button in the secondary menu.

Disable

Disable cost accounts: Click the [Disable] button in the secondary menu.

A security prompt appears. Confirm that you want to disable all accounts.



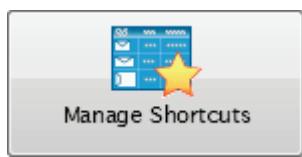
9. Manage shortcuts

9.1. Create new shortcut



Management

Click on [Management] in the main menu.



Manage Shortcuts

Select [Manage Shortcuts].

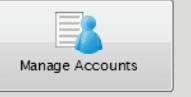
Manage Shortcuts Keys (Drag & Drop into the blue box to synchronize)

6 of 25 shortcuts Keys defined

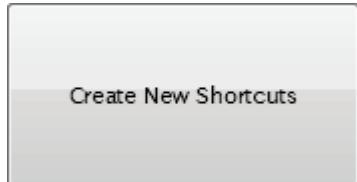
First Class Letters 0 lb 1 oz \$0.44	X	First Class Large Envelopes 0 lb 1 oz \$0.88	X	First Class Packages 0 lb 3 oz \$1.71	X
First Class Letters Registered Mail \$0 0 lb 1 oz	X	International Germany zone: 5 First Class Letters	X	First Class Packages Delivery Confirm. 0 lb 1 oz \$2.51	X
Create New Shortcuts					

 Manage Text Messages

 Manage Shortcuts

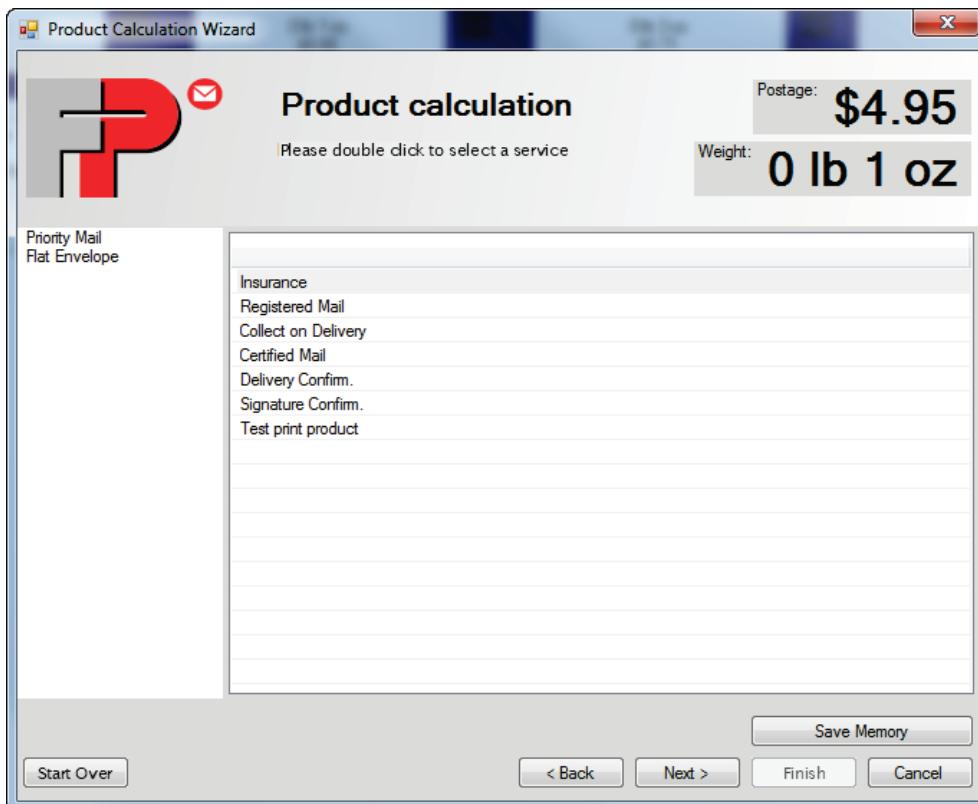
 Manage Accounts

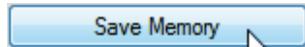
TIP: If you want to define a weight for your new shortcut, set a weight in the ‘Product Selection’ menu.



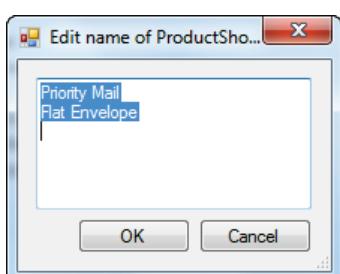
Click on [Create new shortcut].

Navigator opens the Product Calculation Wizard. For detailed information on product setting, please refer to [chapter 5.3](#) ‘Product setting: Select services and set weight’.



 Save Memory

Select [Save Memory].



Navigator suggests a name for the new shortcut.

You can enter a different name if you want.

 Finish

Confirm with [Finish].

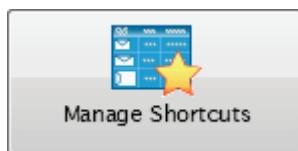
The new shortcut is now saved. In Navigator, you can store up to 25 different shortcuts.

TIP: You can also create a new shortcut opening the Product Selection Wizard directly in the 'Product Selection' menu. Simply click on the field for selecting services.

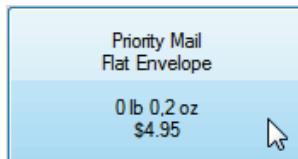
9.2. Rename shortcuts

 Management

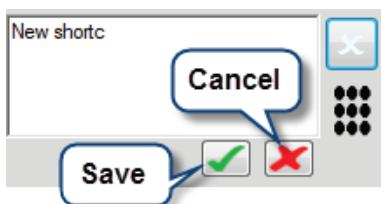
Click on [Management] in the main menu.



Select [Manage Shortcuts].



Click on the shortcut you want to rename.



Navigator opens an input box for text. Enter a new name. Click  to save.



9.3. Resort shortcuts

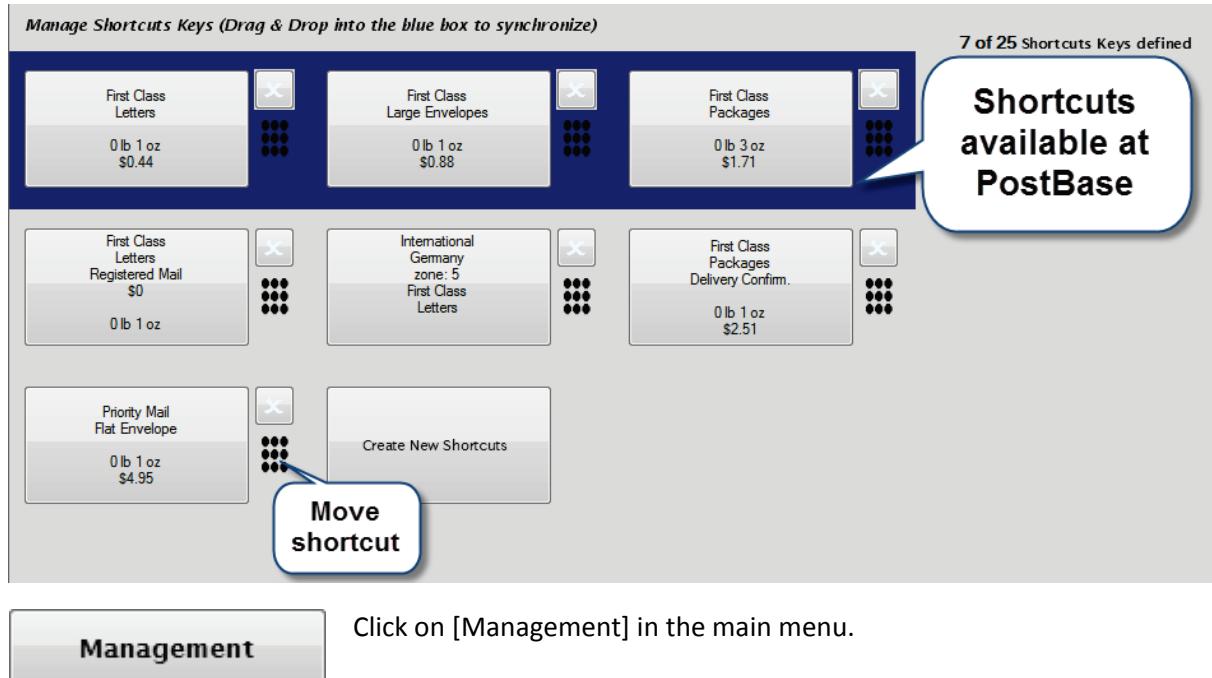
Setting the order of the shortcuts on the list, you determine which of them will be available at the PostBase metering system.

The first three or four shortcuts (depending on the equipment of your metering system) in the list will be transferred to PostBase. In Navigator, these shortcuts are highlighted in blue.

Manage Shortcuts Keys (Drag & Drop into the blue box to synchronize)

7 of 25 Shortcuts Keys defined

Shortcuts available at PostBase



Management Click on [Management] in the main menu.



Select [Manage Shortcuts].



Click on the [Move shortcut] button next to the desired shortcut. Hold down the mouse button.

Move the shortcut to its new position. The other shortcut key will take the empty position.

Manage Shortcuts Keys (Drag & Drop into the blue box to synchronize)

7 of 25 Shortcuts Keys defined



9.4. Delete shortcuts

Management

Click on [Management] in the main menu.

 Manage Shortcuts

Select [Manage Shortcuts].



Select the  button to the right of the shortcut you want to delete.

10. Reset piece counter

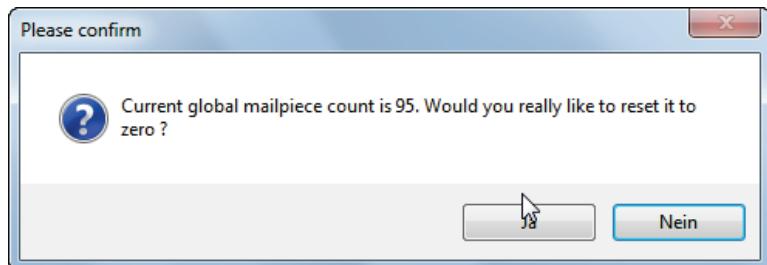
Mailhandler

Click on [Mailhandler] in the main menu.



Select [Item Counter].

A security prompt appears. Confirm that you want to reset the piece counter to zero.



11. Load postage

Mailhandler

Click on [Mailhandler] in the main menu.



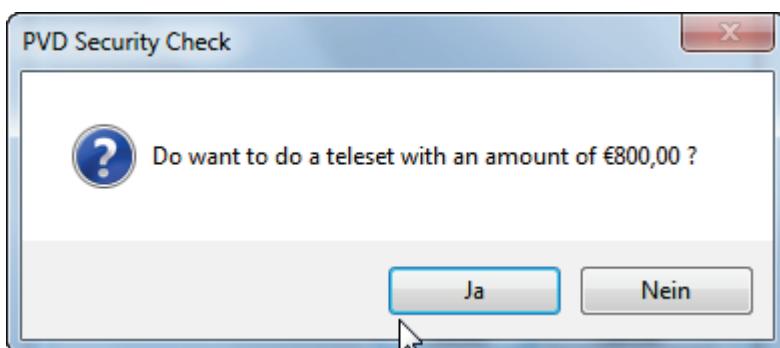
Select [Download postage].

Navigator opens a new window. Set a postage amount via PC keyboard or using the arrow buttons. You can enter the amount in increments of 10.

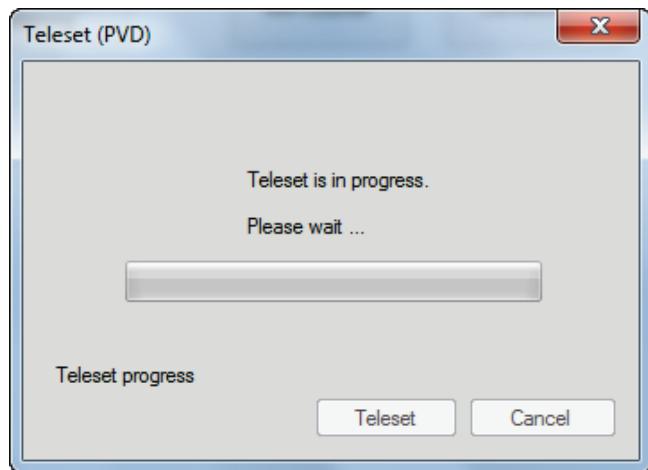
**Teleset**

Confirm with [Teleset].

For control purposes, Navigator displays the set amount again. Confirm to start loading.



A new window shows you that Navigator is loading postage.



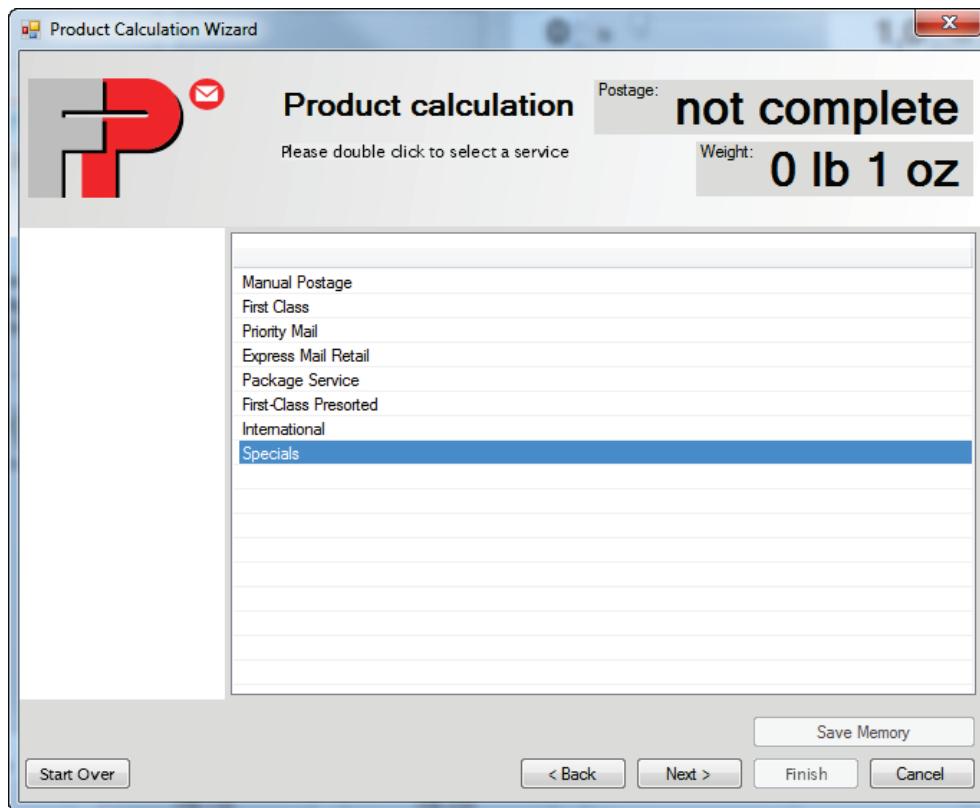
12. Redate

If the meter imprint shows an incorrect date, you can print a correction with the correct date on the non-address-side of the mail piece already metered.

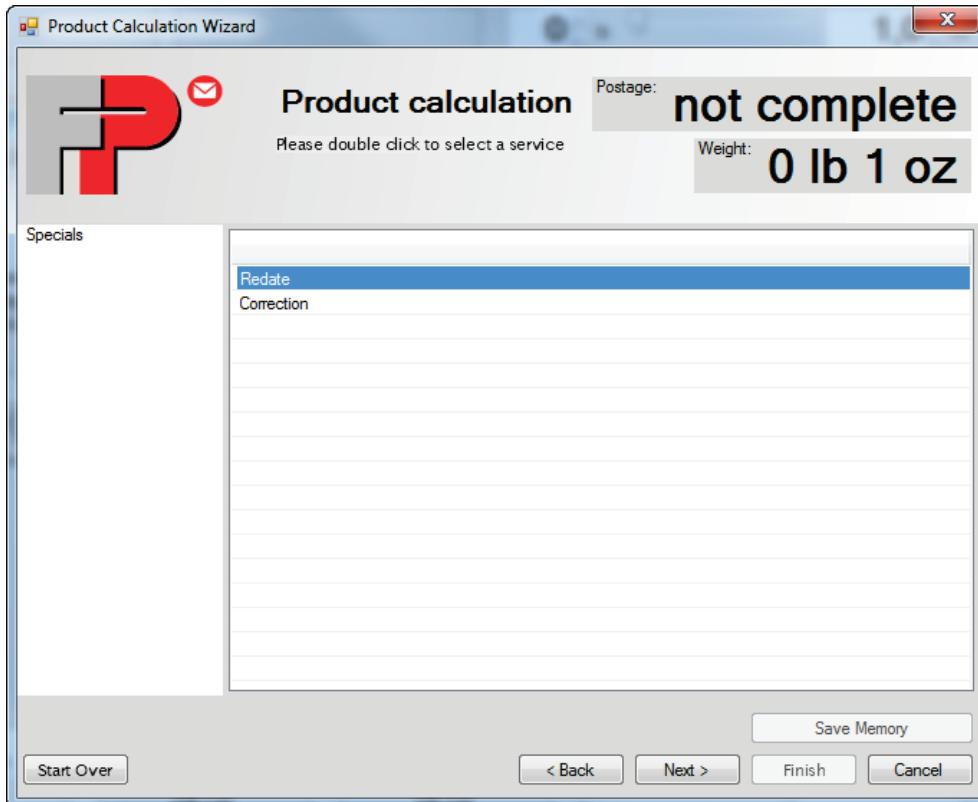


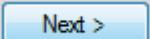
Click on the field for selecting services to perform a redate imprint.

Navigator opens the Product Calculation Wizard. Select the 'Specials' option. Click [Next].



Select 'Redate'.



 Next >

Click [Next].

 Finish

Confirm with [Finish].



In the 'Product Selection' menu, click on the button displaying the date. Set the new date to be imprinted. For detailed information, please refer to [chapter 5.8](#). 'Set date'.

To start the redate imprint, please proceed as described in [chapter 5.9](#). 'Metering'.

13. Troubleshooting